

County of San Diego, Health and Human Services Agency (HHSA)
CalFresh Program Guide

Eligibility Status Report Form – SAR 7

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Background:

The SAR 7 eligibility status report is used to determine ongoing eligibility and benefit amounts.

Policy:

63-273.1 Eligibility Status Report Form – SAR 7

The Semi-Annual Report (SAR 7) will be submitted at 6, 12 or 18 months after the Beginning Date of Aid. The SAR 7 will be used to:

- Determine ongoing eligibility based on income and information provided
- Calculate benefit amount using reasonably anticipated income, expenses and prospective budgeting.
- Capture income, expense and eligibility information from the SAR Data month and any known changes reported in the SAR Data month.

63-273.2 Explanation of SAR 7 during the interview:

Explain the SAR 7 to customers during the interview process. Refer to Processing Guide 273-01.

63-273.3 Information required to be provided with the SAR 7:

Customers must provide information; answer all questions on the SAR 7 and attest, under penalty of perjury, that they have truthfully reported all required information. Customers will report on the SAR 7:

- Income and expenses for the Data month,
- Income and eligibility information from the Data month,
- Changes or anticipated changes since the last report (application, recertification or last SAR7),
- All required verifications for the reported changes
- Reasonably anticipated income and expense changes for the next certification period that are known during the Data month.

If other reported information received while processing the SAR 7 indicates that the information was not known by the customer until after the Data month, the change will be treated as a voluntary mid-period report.

The following reported changes may be considered voluntary mid-period reports:

- Changes that did not occur in the Data month
- Changes were not known to the customer until after the Data month
- Changes that occurred during the submit month
- Decreased income for the Data Month is reported by the customer on the SAR 7 will be considered a mid-period report. The customer may be entitled to a supplement for the SAR submit month due to the decrease in income.

Refer to Definitions and Examples for case scenarios of voluntary mid-period reports and SAR 7.

63-273.4 Verifications Required with the SAR 7:

Customers will need to provide the following verifications with the SAR 7, if required:

- Gross non-exempt Income.
- Dependent care costs, when there has been a change since the last report, or when there is questionable information.
- Medical expenses –
 - If a customer reports a change in Medical expenses that will increase their benefits, the customer must provide verification of the expenses before the change can be made to increase benefits.

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- If the customer reports medical expenses that will decrease their benefits or make the customer ineligible, the customer does not need to provide verification of the expenses in order for the change to be made to decrease or discontinue the benefits. However, the verification will need to be received before the case is recertified.
- Self-Employment Income
- Self-Employment expenses, if the customer is claiming actual expenses. Verification of expenses is not required if the customer is claiming the 40% standard deduction.
- Changes in child support payments, or legal obligation to pay child support to a person not in the CalFresh household (63-224.14).
- Verification of shelter costs is not required at SAR 7. Rent or Mortgage costs are only verified at application, and when rent is being reported for the first time.

Refer to Processing Guide on steps to take when questionable information has been submitted with the SAR 7.

Refer to Processing Guide on how Voluntary Mid-Period Report Changes will be handled when processing a SAR 7.

63-273.5 Criteria for Complete SAR 7:

Customers are required to submit a complete SAR7 with verifications needed to determine ongoing eligibility and benefit allotment. The SAR 7 will be considered to be complete if:

- The form is signed no earlier than the first day of the Submit Month.
- All questions and items are answered and complete
- Verifications have been provided
- The documentation provided is sufficient to make an eligibility and benefit level determination

Customers are not required to report on the SAR 7 voluntary mid period reports that have already been reported and verified. However, if a voluntarily reported mid period report was not verified, the customer is required to provide this verification with their SAR 7.

Refer to Processing Guide 273-01 for criteria for a complete SAR 7.

63-273.6 SAR 7 Review:

Refer to Processing Guide 273-01 for steps on how to review the SAR 7.

Procedure:

Processing Guide 273-01 Eligibility Status Report-SAR 7 (S:\ENTERPRISE\Food Stamp State Forms\SPOS Folder\Guides Charts & Tables\Processing Guides)

Definitions and Examples (S:\ENTERPRISE\Food Stamp State Forms\SPOS Folder\Guides Charts & Tables)

References:

ACL 15-90

ACL 15-90E

Sunset Date:

This policy will be reviewed for continuance by 06/03/2019

Release Date:

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